



TPG PARTNERS
Optimizing Supply Chains Globally

TPG PARTNERS CONSULTATIVE POSITION PAPER

Data Center Moves / Relocations

TPG Partners – Dallas / Fort Worth - www.TPG-Partners.com

Version 1.1

August 15, 2021



TPG Best Practices – Data Center Relocations

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TPG Best Practices – Data Center Relocations

1. Introduction

TPG has successfully partnered with our clients to achieve their data center moves; achieving near transparent results to its clients' stakeholders.

We have engaged in several variations of Data Center moves including:

- Move everything to the cloud
- Hybrid: Move parts to the cloud keep parts present in current on-prem location
- Hybrid: Move parts to the cloud, relocate on-prem to different location

Our work products have included closing offices, safely disposing equipment, terminating lease agreements (hardware), etc. and opening new offices: network requirements, equipment (telephonic, video, etc.).

Through all these variations, it cannot be overstated the complexities associated with these data center moves encompassing people, locations, technical and security challenges. These complexities make it critical that the program is operated with high degree of coordination with a very strong governance.

Your management, your customers, your employees are counting on a near transparent orchestration of events. The very best possible outcome is a relocation where no one knows it occurred. TPG has partnered with its clients to achieve this very outcome.

2. Best Practices:

To achieve this near transparent orchestration of events, TPG has adopted the following best practices associated with data center relocations:

- Perform detailed review of all physical and logical components of your infrastructure is critical; scanning software is to be contemplated as input to this process; not the final result of this process
- Engage the business early in the process to help 1) confirm application portfolios and prioritization (sunsetting systems); 2) confirm test plan to ensure application continue to function and 3) participate in the validation
- Ensure continues understanding of changes to the data center environment (make sure team is looped into PCR process)
- Establish empowered Steering Committee to make quick decisions as risks are realized or issues encountered
- Ensure implementation checklists have proper back-out planning in the event of failed implementation
- Implement a multi-part implementation segregated by business function; the strategy is not just IT centric; it needs to be business centric as well
- Ensure that if a new data center is in scope, that data center buildout is a separate project that needs to be managed; including permitting, union labor (if required), procurement of circuits, hardware procurement, software procurement

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3. TPG Role:

TPG has experience in data center moves well beyond simply “reporting the news”. We have proactively ensured successful implementation of data center moves through:

- “Hands On” Program management working with Cloud provider, client’s 3rd party consulting, client business, client IT staff to establish detailed plan with key milestones
- Proactively perform both Risks and Issues management. We intentionally look ahead to potential events that may realize risks or cause issues and steer the program “through” or “around” these obstacles
- Engage/Partner with the business to ensure they are ready and available with success criteria established to ensure applications were validate after transition
- Operate weekly status meeting focused on driving the team to milestones; looking for quick issues resolution and escalations to the business steering committee to overcome major obstacles
- Continuously challenged team ... what are we missing? Do we have the right plan? Fostered an atmosphere of “Can Do” vs. “Can’t Do”

4. Standard Approach:

TPG, through its many implementations, has established a standard approach that is tailored to fit the needs of its clients.

- Kickoff/Charter
 - o Identify overall business goals and objectives (definition of success)
 - o Confirm overall IT goals and objectives (hybrid or full cloud?)
- Analysis:
 - o Decompose Data center into both Logical and Physical mappings;
 - Inventory business applications on each physical hardware
 - Identify every circuit connecting into the data center and all network routes which are used to connect into the data center
 - Inventory Software applications
 - Inventory all hardware
 - Identify all paths between hardware
 - Identify all paths between software solutions
 - Identify all data stores and data paths to data stores
 - Identify data retention policies (do we take the opportunity to purge (offline) data during the move
 - o Confirm and document security requirements for end state
 - o Confirm and document growth requirements for hardware (Target initial 3-year growth)
 - o Confirm and document any systems that will be sunsetted (i.e., not moved) and build sunset plan
 - o Confirm and document (prioritize) business applications impact to the business if offline (confirm by business system down time constraints)

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- Plan:
 - o Build multi-phase plan; may require swing (temporary) system during migration.
 - o Plan has to include ability to ensure fall back in the event system/application fails to function
 - o Plan has to include lag time to implement technology changes (circuits, data pathways)
 - o Plan has to account for limited availability of Network staff (typically network engineers are over tasked for normal production support activities)
 - o Plan has to account for Security audits (again, security team is typically over tasked for normal production support activities)
 - o Implementation checklist established and validated by phase. Checklist is a road-map by day/hour what happens and who is accountable. Depending on the criticality to the business, perform rehearsal of check-list to confirm all components are addressed participated by the business and IT. Each check-list evaluated for risk and mitigation strategies document in the event the risk is high enough probability to warrant mitigation
- Execute:
 - o Execute the implementation checklist acting on mitigation strategies as appropriate.
 - o Establish war-room (conference bridge) during critical phases of each implementation; clear sign-off's/transition on each element of the implementation plan
- Post Implementation
 - o Establish decommission plan: what equipment is repurposed, what equipment is disposed, what equipment is to be returned (leased), what equipment is left in place (if any), what data needs to be archived?, what services need to be terminated (i.e. security services)
 - o Execute the decommission plan

5. Selected Experiences:

- General Merchandise and Pharmacy Retailer
 - o Migrated Old Data Center (circa 1970's) running CICS Cobol with added on systems.
 - Challenges: no documentation, tribal knowledge contained within 2 long term employees; Unsophisticated IT department, undisciplined management team
 - o Successfully migrated to the cloud/new office location and decommissioned data center
- Fully vertically integrated American Clothing Company
 - o Moved Data Center from JV partner into JV servicing organization.
 - Challenges: very short time to accomplish; multi-language communication (Mexico/US); dealing with Mexican regulatory requirements
 - o Successfully migrated to the JV servicing organization and relocated office to servicing organization